

3 Days

Public Sector Procurement and Payables in Microsoft Dynamics AX 2012

This course provides insight and guidance to procurement and sourcing features along with Accounts Payable features in Microsoft Dynamics AX that are often used by public sector organizations as they request, order and pay for products and services. It also provides information on workflow and the Vendor Portal and Procurement Order Site.

Course Details

Course Outline

Module 1: Procurement and Accounts Payable Overview

- This module introduces Procurement and sourcing features along with Accounts Payable features in Microsoft Dynamics AX. that are often used by public sector organizations as they request, order and pay for products and services.

Module 2: Procurement and Accounts Payable Setup and Purchasing Policies

- This module focuses on setting up main accounts, posting definitions, journals, payment terms and other items to make the most of purchasing related features in Microsoft Dynamics AX.

Module 3: Workflow

- This module provides guidance on creating and configuring workflows used for purchasing and procurement related tasks in Microsoft Dynamics AX.

Module 4: Vendors

- This module discusses what is necessary to track businesses and individuals that you purchase product and services from in Microsoft Dynamics AX.

Module 5: Procurement Categories and Catalogs

- This module introduces how to create, publish and update a catalog. It also discusses how to manually create a catalog and import catalog data from a vendor.

Module 6: Request for Quotation

- This module discusses a request for quotation (RFQ) and it's role in the purchasing process. It provides guidance on creating RFQ's, and eventually creating a purchase order from an FRQ.

Module 7: Purchase Requisitions

- This module discusses how to create a purchase requisition, complete it, and approve it to create a purchase order.

Module 8: Purchase Orders and Vendor Returns

- This module reviews frequently used forms and list pages for purchase orders. It demonstrates how to create, process and copy purchase orders. It also discusses how to create a credit note for a vendor return.

Module 9: Purchase Agreements and Signing Limits

- This module discusses how to create a purchase agreement. Each of the four types of commitments that comprise an agreement are discussed. It also identifies the available signing limits that can be applied to employees.

Module 10: Vendor Invoices

- This module discusses entering vendor invoices against purchase orders, purchase agreements and projects. It also discusses the different types of invoice matching, along with a discussion on payment proposals.

Module 11: Vendor Portal and Procurement Order Site

- This module focuses on the features of the vendor role center, how to order products using the Employee Services site, and features of the Vendor Portal. It also discusses how to view and create purchase requisitions on the Procurement Order site.

Module 12: Procurement Year-End Activities

- This course discusses how to close purchase order encumbrances in the current year, and open in the next fiscal year. It also discusses other possible year-end tasks.

Who Should Attend

This course is intended primarily for partners that sell and implement public sector solutions to customers. It can also be helpful to professionals that are already familiar with AX Public Sector financial topics and need to learn about procurement functionality.

Pre Requisite

Before attending this course, applicants must have:

1. Completed Course 80219A, Financials I in Microsoft Dynamics AX 2012, or have equivalent knowledge of the financial tasks covered in this course.
2. Completed Course 80220A, Financials II in Microsoft Dynamics AX 2012, or have equivalent knowledge of the financial tasks covered in this course.
3. Completed Course 80338A, Microsoft Dynamics AX 2012 Public Sector - Financials or have equivalent knowledge of the content covered in this course.

Exams

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